

30th OCTOBER, 1942.

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NEW SOUTH WALES.

BUSINESS STATISTICS - OCTOBER.

C O N T E N T S.

PART I. PRIMARY & EXPORT INDUSTRIES.

Rural Industries - General: Seasonal Conditions. Meat Commission.
Food Supply. Rural Organisation.

Wool: Arrivals in Sydney low. Shearers' wages increased.

Wheat: Advance No. 4 Pool (1941/42). U.S. Crop.

Dairy Industries: Butter produced, August, 1942. Quotas for
intra-State trade, Nov., 1942. Pay to cream suppliers,
North Coast, Sept., 1942.

Coal: Prices.

PART II. FINANCE & TRADE.

General.

Share Prices: September, 1942.

Bond Yields & Mortgage Rates: September, 1942.

Private Banks: Deposits and Advances, Sept., Qr. (N.S.W.), Sept.
(Aust.)

Bank Clearings: September, 1942.

Savings Banks & W.S.C.: Deposits, Sept., and W.S.C. sales.

Real Estate Sales & Mortgages: September, 1942.

Wholesale Trade: Sales, Employment, Aug., 1942.

Retail Trade: Sales, Stocks (Sydney stores), Employment, August, 1942.

PART III. INDUSTRIES, etc.

Employment: Total, non-rural, August, 1942. Employment in factories,
Aug., 1942.
National Service Office returns, September, 1942.

Building: Buildings commenced, Metrop. Water Board Area, Sept., 1942.

Railways : Operations, August, 1942.

Trams & 'Buses: Operations, August, 1942.

Motor Vehicle Registrations: September, 1942.

PART I - PRIMARY & EXPORT INDUSTRIES.GENERAL.

Seasonal conditions. Rainfall during October was mainly below average except in the coastal belt of New South Wales. Seasonal conditions, however remain generally favourable.

Meat. In order to increase sheep slaughtering some men have been released from the Army to return to the Abattoirs.

The Minister for Commerce gave an undertaking that all pig products will be purchased by the Federal Government from the end of November until the end of 1944 at prices not less than export parity.

Meat prices will continue to be controlled by the Prices Commissioner to whom the Commonwealth Meat Commission will make recommendations.

Food Supply. The yield of rice this season is estimated at not less than 60,000 tons of paddy rice from 34,000 acres compared with 42,000 tons from 23,720 acres in 1941/42. The Minister for War Organisation of Industry stated that this will be sufficient for Service, civilian and export demands.

Rural Organisation. The Commonwealth Government has decided to appoint a Director of Agriculture to administer an Australia-wide scheme of planned agricultural production.

WOOL.

Clothes rationing has reduced civilian demand for the products of Australian mills but a large variety of fabrics are being supplied to the American forces here.

Arrivals of wool in Sydney for appraisalment have been slower this season and are about 250,000 bales less than last year. Wool has been appraised immediately on arrival and there has been no necessity for storage prior to appraisalment.

Shearing has been slow although the zoning scheme has made possible the best use of the man power available.

Shearers' wages have been increased from 39/3 to 40/3 per 100 sheep and other shearing employees will receive 4/- extra per week. The award applies in all States except Queensland.

WHEAT.

An advance of $1\frac{1}{4}$ d. for bagged wheat and $\frac{3}{4}$ d. for bulk wheat in No. 4 Pool (1941/42) will practically complete payments in respect of this pool. A final adjustment is expected to be only a fraction of a penny. The total advance (per bus.) is now $3\frac{1}{4}$ d., less freight, for bagged wheat and $3\frac{3}{4}$ d., less freight, for bulk.

Harvesting of the 1942/43 season's crop is commencing in early districts.

The wheat crop in U.S.A. is estimated at 984m. bus. (29m. bus. above previous estimate). Production in 1941/42 was 944 m. bus.

DAIRY INDUSTRIES.

The Minister for Commerce stated on 21st October that the £2m. subsidy to producers of milk for butter and cheese is only the first step by the Government to stabilise the dairying industry in Australia.

Butter produced in N.S.W. factories in August, 1942 was 5,300,000 lbs., a better output than in the two previous years and it compares with 5,588,000 lbs. average for August, 1934-1936.

BUTTER PRODUCED - N.S.W. FACTORIES.

'000,000 lbs.

Year	Jan.	Feb.	Mar.	Apr.	May.	June	July	Aug.	Sept.
1939	9.7	10.8	12.1	11.9	10.5	7.7	6.6	6.4	7.3
1940	12.6	10.6	9.6	9.2	7.3	5.1	5.0	5.0	6.5
1941	14.5	12.8	11.7	8.7	6.8	5.2	4.6	4.6	5.9
1942	6.7	8.3	10.1	8.6	6.8	5.5	5.2	5.3	6.0

Quotas of butter and cheese for local consumption during November, 1942, have been fixed at 39% and 31% respectively. In 1934/35, the year of record production in Australia and one of the best years in N.S.W., the corresponding quotas were 26% and 44%.

QUOTAS OF BUTTER AND CHEESE FOR LOCAL CONSUMPTION.
N.S.W., VIC., Q'LD. & TAS.

Month	BUTTER.				CHEESE ^ø			
	1934/35 ^x	1940/41	1941/42	1942/43	1934/35	1940/41	1941/42	1942/43
	%	%	%	%	%	%	%	%
July	50	73	64	84	75	51	61	68
Aug.	55	61	57	76	75	41	47½	50
Sept.	50	54	51	53	75	39	36	43
Oct.	33½	42	46	41	37	33	28	33⅓
Nov.	26	37	45	39	44	30	29	31
Mar.	32	44	47		58	50	42	
June	68	71	85		78	70	63	

^x Year of record production in Australia.
^ø Applies to South Australia also.

During the months July-Sept. pay to suppliers of cream to certain North Coast butter factories was at the rate of 13½d. per lb. of commercial butter made. Deferred pay, calculated at the end of each half-year, was ½d. per lb. in the period July-Dec., 1941.

COAL.

It was reported in a recent issue of B.S. that tenders accepted for the supply of coal to the Railways during the year ending Sept. 30, 1943 showed an increase in the cost of coal of a little more than 1/- per ton.

Following a cost of living adjustment to miners' wages as from November, colliery proprietors have applied for an increase in the selling price of coal.

PART II. FINANCE AND TRADE.GENERAL.

Referring to the Austerity Loan, Mr. Curtin said that the Government was determined to get the funds necessary to carry out the war programme and if voluntary loans failed other methods would be used. "We propose," he said, "gradually to contract facilities for undesirable expenditure.....There is probably room for increased taxation, but the income tax now is heavy in the middle range of incomes". Very high direct taxation or any scheme of compulsory contributions to loans would create difficult social anomalies due to existing commitments for education and the like.

SHARE PRICES.

Share prices on the Sydney Stock Exchange show continued strength. The complete index (compiled by the Government Statistician) was 162 in September, 1942, compared with 182 in November, 1941, immediately before Japan entered the war. The index of the prices of 34 active shares was 179 in September, 1942, or 12 points above August.

The course of share prices in October is shown by the Stock Exchange Bureau's index (34 ordinary industrial shares, 1934 = 100) which was 116.12 on 1st of the month and 117.08 on 30th. Shares offering for sale are restricted in quantity.

Shares of manufacturing and distributing companies are at the same level as in the pre-Pacific war period, pastoral and finance companies are commanding even higher prices and other types have shown advancement, particularly in very recent months.

Further upward revision of maximum permissible share prices will not be allowed except in special cases. This was decided after a conference of Stock Exchange representatives with the Treasurer during October.

INDEX OF SHARE PRICES - SYDNEY.

Prices of ordinary shares - excl. banks. Par value = 100.

(Compiled by N.S.W. Government Statistician).

Average for Month.	Manufacturing & Distributing.	Retail Trade.	Public Utilities.	Pastoral & Finance.	Insurance	Total 75 Companies	34 Active Shares.
1937-Mar.	214	204	181	169	281	190 ^(a)	201
1939-Sep.	209	161	152	127	257	171	180
1940-Sep.	207	158	134	116	235	162	176
1941-Sep.	228	177	142	128	253	175	191
1942-Jan.	199	154	136	116	236	157	166
" -June	184	146	117	116	216	147	157
" -July	191	150	118	115	217	150	163
" -Aug.	198	150	120	117	224	153	167
" -Sep.	213	156	124	126	238	162	179

(a)

Highest point recorded.

BOND YIELDS & MORTGAGE RATES.

The yield on Commonwealth bonds subject to 1930 rates of taxation continues downward. Bonds subject to current rates of taxation remain steady. Such bonds, maturing in 5-10 years, at current prices yield 3.22% (£3. 4. 5 per cent.). Long term bonds (16 years) in the Austerity Loan will be available at par to yield £3. 5. 0 per cent. Short terms bonds (5 years) will carry interest at £2.10. - per cent.

The weighted average rate of interest on private first mortgages registered in the three months ended September, 1942 showed an increase over August although the trend of rates has been downward.

YIELD ON COMMONWEALTH BONDS AND MORTGAGE RATES.

Period.	COMMONWEALTH BONDS Ø			MORTGAGES +	
	Maturing in 5 - 10 years.		Maturing in 10 years or more, Taxed at 1930 rates.	Rates of interest on first mortgages.	
	Taxed at full C'wealth rates.	Taxed at 1930 rates.		Rural	Urban
	%	%	%	%	%
1939	x	3.87	3.92	5.2	5.6
1940	(9 mths) 3.15	3.25	3.30	5.1	5.6
1941	3.17	2.95	3.10	4.9	5.5
1940-Sept.	3.16	3.14	3.22	5.0	5.6
1941-Sept.	3.19	2.95	3.15	4.8	5.5
1942-Jan.	3.22	2.92	3.04	5.0	5.5
-June	3.22	2.93	3.13	4.9	5.4
-July	3.22	2.89	3.13	4.9	5.3
-Aug.	3.22	2.80	3.03	4.8	5.2
-Sept.	3.22	2.67	2.86	5.0	5.3

Ø Last Wednesday in each month. Compiled by Commonwealth Bank.

+ Weighted average rate on private first mortgages registered in three months ended month shown.

x Not available.

BANKING.

Average private deposits and advances in private trading banks in N.S.W. for September Quarter, 1942 are shown in the table below in comparison with earlier quarters.

PRIVATE BUSINESS IN PRIVATE BANKS IN N.S.W. (a)

Aggregate Quarterly Averages. £ million.

Quarter ended -	DEPOSITS			Advances	Excess of Deposits over Advances.
	Fixed	Current	Total		
Sept. 1939	64.6	50.0	114.6	124.2	(-)9.6
" 1940	65.0	62.3	127.3	119.2	8.1
June 1941	65.8	69.9	135.7	113.9	21.8
Sept. 1941	64.9	71.1	136.0	114.9	21.0
June 1942	61.8	81.3	143.1	107.9	35.2
Sept. 1942	62.7	80.9	143.6	107.7	35.9

(a) Excl. C.wealth. and Rural Banks and excl. Government deposits.

(-) Denotes excess of advances over deposits.

Contrary to the trends, in comparison with June Qr., 1942, September Qr., averages for N.S.W. showed a slight increase in fixed deposits and a slight decrease in current account deposits.

There is normally a decrease in N.S.W. private current account deposits from June Qr. to September Qr. but the war period has been marked by a rapid increase in these deposits. Year to year changes are shown by the following figures:

PRIVATE DEPOSITS & ADVANCES - PRIVATE TRADING BANKS^Ø - N.S.W.

Year's change - September Quarter Averages. (Increase +,
Decrease -).

	<u>Fixed</u> <u>Deposits.</u>	<u>Current A/c.</u> <u>Deposits.</u>	<u>Total</u> <u>Deposits</u>	<u>Advances</u>	<u>Excess of Deposits</u> <u>over Advances.</u>
	£'s. millions.				
1938 to 1939	+ 2.0	+ 2.7	+ 4.7	+ 3.3	+ 1.4
1939 to 1940	+ 0.5	+12.3	+12.8	- 4.9	+17.7
1940 to 1941	- 0.1	+ 8.8	+ 8.7	- 4.3	+13.0
1941 to 1942	- 2.1	+ 9.7	+ 7.6	- 7.2	+14.8

Ø See note (a) to table above.

Deposits in the trading banks in Australia on current account increased by £8.4m. and advances decreased by £5.5m. during September, 1942. At the same time cash holdings increased slightly, Treasury Bills by £5.5m., other Government securities by £1m. and special war-time deposits with the Commonwealth Bank by £2.7m. Further increases in the trading banks' special war-time deposits are shown by the weekly Commonwealth Bank returns. By October 19th, £46.4m. of their funds were held in this form. These funds normally would be available for investment, use in advance business etc.

SAVINGS.

Savings bank deposits in N.S.W. increased by £1,658,000 in September, 1942. Although less than in the two preceding months the increase was over 50% greater than in September, 1941. The total increase in deposits during the year ended September 30th, 1942 was £10,651,000 (11.74%) compared with £6,907,000 (8.24%) in the year ended Sept. 30th, 1941. For the whole of Australia the percentage increases during these years were 12.78 and 8.43 respectively.

The total war-time increase in savings bank deposits in N.S.W. is £14.4m. and net sales of War Savings Certificates from March, 1940 to June, 1942 were £9.45 m.

The number of open accounts in savings banks in N.S.W. is increasing rapidly.

SAVINGS BANKS - N.S.W.

	<u>Sept.</u> <u>1939.</u>	<u>Sept.</u> <u>1940</u>	<u>Sept.</u> <u>1941</u>	<u>Aug.</u> <u>1942.</u>	<u>Sept.</u> <u>1942.</u>
Amount of Deposits (£000) :	86,557	83,827	90,735	99,727	101,385
No. of Open Accounts (000):	1,316	1,327	1,373	1,406	1,417

SAVINGS - N.S.W.

£000	<u>Increase during Month:</u>				
	<u>Sept.</u> <u>1939.</u>	<u>Sept.</u> <u>1940.</u>	<u>Sept.</u> <u>1941.</u>	<u>Aug.</u> <u>1942.</u>	<u>Sept.</u> <u>1942.</u>
Savings Bank Deposits:	(-)400	754	1,017	2,396	1,658
War Savings Certificates ^Ø :	--	293	173	275(a)	275(a)
TOTAL :	(-)400	1,047	1,190	2,671	1,933

- Ø Net purchases (sales less redemptions).
(a) Av. monthly net purchases Jan.-June, 1942.
(-) Denotes decrease.

REAL ESTATE SALES & MORTGAGES.

Real estate sales in September, 1942 were of about the same volume as in August and about 55% of the corresponding month in 1939. Amended regulations introduced recently are expected to reduce real estate sales substantially.

Mortgage business is slack.

REAL ESTATE SALES AND MORTGAGES - N.S.W.

(Thousands of £'s.)

Year	Monthly Average	<i>Sales</i>			Monthly Average	<i>Mortgages</i>		
		July	Aug.	Sept.		July	Aug.	Sept.
1938	3,118	2,894	4,262	3,079	2,247	2,285	2,184	2,085
1939	2,680	2,919	3,068	2,934	1,870	1,950	2,770	1,501
1940	2,588	3,217	2,259	3,149	1,375	1,748	1,099	1,240
1941	2,770	3,165	2,545	2,941	1,303	1,470	1,213	1,571
1942	1,677½	1,540	1,671	1,616	721½	622	451	517

(a) Incl. renewals.

★ Av. for nine months Jan.-Sept.

BANK CLEARINGS.

Bank clearings are at a high level. The index which averaged 120 in 1941, has exceeded 130 in three of the last four months and in September was 134. (The index is actually a three months' moving average).

The total amount of clearings (excl. Treasury Bill transactions) was £906.8m. in the nine months ended September, 1942 compared with £833m. in the corresponding period last year and £676.5m. in 1939. Clearings so far this year thus are 134% of the 1939 (Jan.-September) figure.

BANK CLEARINGS - SYDNEY.Excl. Treasury Bill transactions.

Year.	AMOUNT.		Index Number (Base:- Av. corresp. period 1926-30 = 100).	
	September	Nine Months Jan.-Sept.	Three months ended Sept.	Calendar year.
	£m.	£m.		
1938	77.6	692.1	99	101
1939	74.9	676.5	99	100
1940	84.5	791.1	117	113
1941	94.9	833.0	124	120
1942	105.6	906.8	134	-

WHOLESALE TRADE.

Sales by wholesalers in N.S.W. registered under Sales Tax Acts continue at a high level. These sales include civilian and Government orders. During August, 1942 there was some increase in employment in wholesale trade, a usual seasonal occurrence. Sales also reached higher figures than in July.

Clothes rationing began on June 15th but was not designed to restrict wholesale supplies to retailers for some time and there was no apparent effect on August wholesale trade.

EMPLOYMENT IN WHOLESALE TRADE by Employers whose principal activity is wholesale trade, as recorded on Pay Roll Tax returns

	<u>July, 1941.</u>	<u>Aug., 1941</u>	<u>Dec. 1941</u>	<u>Mar., 1942</u>	<u>July, 1942</u>	<u>Aug., 1942.</u>
Males ('000)	29.1	29.0	28.5	27.6	24.9	25.0
Females ('000)	10.0	10.3	10.9	11.0	11.1	11.4
Total ('000)	39.1	39.3	39.4	38.6	36.0	36.4

WHOLESALE TRADE, N.S.W.

Sales by traders registered under Sales Tax Acts.
Total, taxable and exempt goods.

	<u>1938</u>	<u>1939</u>	<u>1940</u>	<u>1941</u>	<u>1942</u>
Sales - £ millions.					
Calendar Year	193.0	200.3	202.8	229.0	-
March Qr.	45.7	45.6	47.9	50.7	57.6
June Qr.	48.7	48.1	49.8	59.6	58.8
Month of June	15.0	14.9	17.1	21.8	18.93
" " July	16.2	15.3	16.7	17.6	19.17
" " Aug.	15.3	16.8	17.2	20.4	20.86

RETAIL TRADE.

The index of retail sales in large Sydney stores (three monthly moving average, 1931 =100) has moved as follows:-

1942.

Jan.	...	160	May	...	192
Feb.	...	166	June	...	170
Mar.	...	178	July	...	154
Apr.	...	194	Aug.	...	164

In August, 1942 there was a reaction from the low sales of clothing in July. Following the introduction of standard designs of dresses and suits on 27th July, there was increased demand for those made up and in stock. Sales of boots and shoes were high due to fears of shortages. There were also large sales of household piece goods, furniture and soft furnishings not subject to rationing.

In July there is usually a seasonal increase in employment in retail trade but there was a decline in July, 1942 and a further decline in August in respect of both male and female employees.

EMPLOYMENT IN RETAIL TRADE by Employers whose principal activity is retailing, as recorded on Pay Roll Tax returns:-

	<u>July,</u> <u>1941.</u>	<u>Aug.,</u> <u>1941.</u>	<u>Dec.,</u> <u>1941.</u>	<u>June,</u> <u>1942.</u>	<u>July,</u> <u>1942.</u>	<u>August,</u> <u>1942.</u>
Males ('000)	31.9	31.4	31.9	25.6	24.9	24.5
Females ('000)	31.8	31.3	35.2	32.6	32.1	31.9
TOTAL ('000)	63.7	62.7	67.1	58.2	57.0	56.4

♂ Submitted by employers paying over £20 p.wk. in wages.

RETAIL TRADE - SYDNEY.

Percentage increase from corresponding period of previous year.

Period	Net Value of Sales.	Value of Stock	Wages and Salaries Paid.	Number of Employees.
1939	+ 2.4	+ 2.0	+ 2.6	+ 0.9
1940	+ 6.3	+ 17.0	+ 4.0	+ 1.9
1941	+ 14.6	+ 8.0	+ 8.0	+ 4.0
Jan.-June 1941	+ 17.5	+ 1.8	+ 6.9	+ 3.2
" " 1942	+ 3.7	+ 13.5	+ 3.8	(-) 1.5
1942 - Mar.	+ 25.9	+ 11.5	+ 4.6	+ 0.6
Apr.	+ 25.6	+ 8.7	+ 7.8	+ 0.1
May	(-) 8.7	+ 11.5	(-) 0.3	(-) 3.4
June	(-) 19.1	+ 10.5	(-) 1.7	(-) 10.9
July	(-) 15.6	+ 14.7	(-) 11.8	(-) 15.1
Aug.	+ 5.7	+ 13.4	(-) 8.5	(-) 12.5

(Supplied by Retail Traders' Association in conjunction with the Commonwealth Bank).

(-) Denotes decrease.

The tea ration was increased by 20% from 19th October and is now 2 ozs. weekly per person. All tea must now be sold in one of two grades. The retail price of first grade tea from 2nd November is 3/5 per lb. in cities and principal ports.

The Rationing Commission has announced a scale of maximum prices at which damaged clothes may be sold at half-coupon rates. In addition many perishable goods for which the demand has decreased may be sold at reduced coupon rates. From November 12th, it will be illegal to use certain forms of advertising in respect of rationed goods. Circulars and handbills are prohibited; hoardings and signs on buildings cannot be renewed or replaced.

PART III - INDUSTRIES, etc.EMPLOYMENT.

Estimated total non-rural employment in N.S.W. (excl. Household domestics) decreased by 700 from June to July, 1942 and by 400 in August.

The estimated total in August was 763,800 (males 537,600 and females 226,200), the percentage of females being 30% compared with 27% in August, 1941.

Employment of non-rural wage and salary earners was at a peak in November, 1941. The number of male non-rural wage and salary earners has since declined by 31,800 and the number of females employed (other than in rural and household domestic occupations) has increased by 8,400. As shown in the table below Government employment increased by 16,100 and private employment declined by 39,500 between November, 1941, before Japan entered the war, and August, 1942.

The increase in Government employment is due to the munitions programme and large-scale works by Government bodies on behalf of the Allied Works Council. Government staffs engaged on other work include a higher proportion of females than formerly, large numbers of male employees having joined the Forces. The net decline in private employment has resulted from restriction of civil industry and the call-up for the Forces, notwithstanding the influx of persons not normally wage and salary earners. Plans involving a redistribution of the reduced pool of rural labour and help through voluntary assistance and the Women's Land Army are being put into effect.

In order to make available for the Forces from protected and other industries in N.S.W. about 1,000 single men per week, men engaged on unskilled or repetition work are being replaced by older men and women. Married men and widowers with children in the 18 - 35 age group are being called up.

Unless larger numbers of women voluntarily undertake war work, a compulsory call up will take place. The position is most acute in South Australia and Victoria, and in the former State enlistment in the Women's Service Auxiliaries has been restricted and other action referred to earlier in these notes has been taken.

ESTIMATED TOTAL NON-RURAL WAGE-EARNERS EMPLOYED (EXCL. HOUSEHOLD DOMESTICS.)

End of Month	M A L E S			F E M A L E S			T O T A L.		
	Government (C/wealth) State and Local).	Private Employers.	Total.	Government (C/wealth, State and Local).	Private Employers.	Total.	Government (C/wealth, State and Local).	Private Employers.	Total.
	'000	'000	'000	'000	'000	'000	'000	'000	'000
1933-June	103.2	275.7	378.9	16.8	101.8	118.6	120.0	377.5	497.5
1939-July	136.5	399.1	535.6	19.4	141.3	160.7	155.9	540.4	696.3
1941-July	141.5	419.5	561.0	21.7	186.8	208.5	163.2	606.3	769.5
-Aug.	142.1	420.7	562.8	22.1	188.1	210.2	164.2	608.8	773.0
-Nov.	144.3	425.1	569.4	23.0	194.8	217.8	167.3	619.9	787.2
1942-Jan.	146.1	414.2	560.3	23.8	193.3	217.1	169.9	607.5	777.4
-Mar.	148.9	405.3	554.2	25.0	197.1	222.1	173.9	602.4	776.3
-June	152.5	388.4	540.9	27.8	196.2	224.0	180.3	584.6	764.9
-July	154.8	384.3	539.1	28.1	197.0	225.1	182.9	581.3	764.2
-Aug.	154.6	383.0	537.6	28.8	197.4	226.2	183.4	580.4	763.8

(Revised since last issue).

Includes Civil Constructional Corps but excludes persons on military service.

The trend of employment in N.S.W. in certain broad industrial classifications is shown below. The numbers shown do not represent the totals employed in the industries. Comparative figures of employment in wholesale trade and manufacturing are given elsewhere.

The "Commerce and Finance, Other" Group had more male employees in August than in the previous month primarily due to activity of wool brokers and there were more female employees in wholesale trade. These movements are seasonal. Retail trade and "personal service" showed further decreases, particularly in male employees. To some extent, the decline in employment in the "personal service" group, which includes "entertainment", is due to a change in classification. In recent months persons whose chief occupation is in another industry have been excluded from this group. Civil building employment, which since December last has included a large number of men engaged on A.R.P. work, continues to decline. There was an increase in August, 1942, in the number employed by the railways.

NEW SOUTH WALES.

EMPLOYMENT OF WAGE & SALARY EARNERS AS RECORDED BY EMPLOYERS

ON PAY ROLL TAX RETURNS. ϕ

(Thousands).

Last Pay Day in Month.	Employees recorded by Employers whose principal activity is:											
	Mining & Quarrying.		Building & Construction. (a)		Land Transport (R/ways, T/ways & Road).		Retail Trade.		Other Commerce & Finance. (b)		Other private non-rural employment (excl. private domestics). (c)	
	M.	F.	M.	F.	M.	F.	M.	F.	M.	F.	M.	F.
1941-July	21.7	0.2	20.5	0.5	60.7	2.7	31.9	31.8	50.5	19.8	16.3	20.3
-Aug.	21.5	0.2	20.4	0.5	61.1	2.8	31.4	31.6	51.5	20.3	16.6	20.8
-Nov.	21.7	0.2	19.3	0.5	62.0	3.0	32.1	33.8	51.6	21.6	16.7	21.5
1942-Mar.	21.2	0.2	19.9	0.5	62.3	3.3	28.5	33.1	46.9	22.3	15.1	21.5
-June	21.1	0.2	18.2	0.5	62.4	3.4	25.6	32.6	43.7	22.8	13.5	21.4
-July	21.2	0.2	17.2	0.5	62.4	3.5	24.9	32.1	42.6	22.8	13.4	21.5
-Aug.	21.2	0.2	16.5	0.5	62.7	3.6	24.4	31.9	42.9	23.1	13.0	21.6

(Revised since last issue).

- ϕ Pay Roll Tax returns are submitted by all employers (excl. C/wealth Govt., charities etc.) whose pay roll exceeds £20 p. wk.
- (a) Excl. large numbers employed on Construction work by Government authorities.
- (b) Incl. Wholesale trade, banking, insurance, wool, grain and skin marketing and miscellaneous.
- (c) Incl. hotels, restaurants, professional and other personal service.

EMPLOYMENT IN MANUFACTURING.

The estimated number employed in manufacturing is 30% above the 1938/39 average (228,800, including 167,200 males and 61,600 females). In absolute numbers, the increase since 1938/39 in males employed in factories is more than double the increase in females but the proportionate increase in females is the greater.

In recent months, fewer males have been employed in factories while the number of females employed continues to expand.

NEW SOUTH WALES.

TOTAL EMPLOYMENT IN FACTORIES & WORKS.

(Including Working Proprietors).

Period	Number of Employees. (Thousands).									Index Numbers (1938/39 = 100)		
	1940/41			1941/42 ★			1942/43 ★			1940/41	1941/42 ★	1942/43
	M.	F.	T.	M.	F.	T.	M.	F.	T.			
July	180.0	66.0	246.0	209.2	75.1	284.3	214.2	82.7	296.9	108	124	130
Aug.	183.4	67.4	250.8	210.8	76.5	287.3	214.3	83.3	297.6	110	126	130
Dec.	194.1	72.1	266.2	215.5	78.1	293.6				116	128	
Mar.	202.3	73.9	276.2	215.8	80.8	296.6				121	130	
June	207.6	74.2	281.8	214.4	81.3	295.7				123	128	
Av. Whole Year	194.2	71.6	265.8	214.5	78.7	293.2				116	128	

★ Subject to revision.

The comparison given below of employment in certain groups of factories (excluding Commonwealth Government establishments (except for some annexes attached to private factories) illustrates some of the effects of the war. The first group ("Bricks, glass" etc.) shows the effect of reduced building activity but this and other groups in which employment has declined, include some types of factories e.g. glass manufacture which have expanded or switched over to war work. In all except the metal industries, there are fewer male employees. Clothing is the only large group in which there has been a decline in female employees. In other groups there have been substantial increases in female staffs, primarily for war work (e.g. textiles, food and drink and especially, industrial metals). Large Government munition work not included below, employ many females.

NEW SOUTH WALES.

EMPLOYEES RECORDED ON PAY ROLL TAX RETURNS

OF EMPLOYERS WHOSE PRINCIPAL ACTIVITY IS MANUFACTURING.

(Thousands)

Period	Bricks, Glass, Pottery & Minerals n.e.i.		Industrial Metals, Eng'r'g, Shipb'ld'g, Vehicles & Aircraft.		Textiles.		Dress (Clothing).		Food, Drink & Tobacco.		Sawmills, Woodworking & Furniture.		Other Factor (a)	
	M.	F.	M.	F.	M.	F.	M.	F.	M.	F.	M.	F.	M.	F.
July, 1941	13.5	1.0	95.4	10.2	7.2	9.0	8.0	25.1	26.3	12.3	13.0	1.1	38.8	1.1
July, 1942	10.7	1.1	106.6	14.8	6.8	10.4	6.7	23.3	24.7	13.3	10.8	1.0	34.2	1.6
Increase No.	(-)28	0.1	11.2	4.6	(-)0.4	1.4	(-)13	(-)18	(-)1.6	1.0	(-)2.2	(-)0.1	(-)4.6	C
" %	(-)20	10	12	45	(-)6	16	(-)16	(-)7	(-)6	8	(-)17	(-)9	(-)12	

Submitted by all employers (except Commonwealth Government, charities etc. whose pay roll exceeds £20 per week.

(a) Includes Paper and Printing, Heat, Light and Power and Miscellaneous Factories n.e.i.

Changes in types of goods manufactured or treated or in process of manufacture etc. or in designs and composition of products are prohibited except by permit from the Department of War Organization of Industry. It is also necessary to obtain a permit to commence the manufacture of any commodity or to change the premises where manufacture or treatment takes place. Rural production and industrial production under contract with the Commonwealth Government are exempt.

Simplified and standardised styles of men's and boy's shirts, pyjamas and collars have been announced. The method of packing shirts has also been defined with a view to saving labour and materials.

National Service Office Returns.

Statistics of the man power sent to new employment by the National Service Offices in N.S.W. are shown in the table below.

NATIONAL SERVICE OFFICES, N.S.W.

Number of Males Sent to Employment.

Status	April, 1942	May, 1942	June, 1942	July, 1942	August, 1942	Sept. 1942.
Adults	9,432	6,899	7,303	10,765	8,424	9,819
Minors	382	840	1,206	1,612	1,859	2,426
Total	9,814	7,739	8,509	12,377	10,283	12,245

The number of unemployed males on the registers of National Service Offices at the end of each month since March, 1942 are summarised below. There were very few men registered at Metropolitan Offices at the end of September but there were substantial numbers at some country offices and particularly at Broken Hill.

N.S.W. - UNEMPLOYED MALES REGISTERED.

END OF MONTH.

District.	March 1942	April 1942	May 1942	June 1942	July 1942	Aug. 1942	Sept. 1942
Metropolitan Area (incl. Liverpool and Penrith)	1,340	1,543	839	463	388	292	266
Bathurst, Orange and Dubbo	250	304	261	134	158	94	200
Cootamundra, Young and Wagga	249	197	125	188	193	148	103
Albury and Broken Hill	68	147	274	389	389	297	308
Newcastle and Maitland	198	118	286	241	233	241	270
Tamworth and Inverell	87	121	142	263	260	174	138
All other areas.	249	258	259	235	165	165	150
Total, N.S.W.	2,441	2,688	2,186	1,913	1,786	1,411	1,435

BUILDING.

The estimated value of all buildings commenced in the Metropolitan Water Board Area during September, 1942, was £371,000. The portion represented by new dwelling houses (31 in number) was the highest for some time but was still only a fraction of ordinary peace-time activity.

BUILDINGS COMMENCED - METROPOLITAN.
WATER BOARD AREA.

Period	Dwelling Houses(excl. Flats.)	VALUE - £'000						Grand Total.
		Dwelling Houses	Flats	Business Premises(a)	Misc.	Total.		
						City.	Suburbs.	
	Number.							
1938	7,457	6,001	2,481	3,496	564	2,007	10,535	12,542
1939	7,341	5,967	1,855	3,130	955	1,800	10,107	11,907
1940	7,161	6,157	2,341	2,795	1,581	1,545	11,329	12,874
1941	7,177	6,556	2,450	1,738	1,074	706	11,112	11,818
1941 Nov.	634	547	162	83	31	26	797	823
1942 Jan.	334	294	57	66	99	13	503	516
June	30	19	-	775	48	81	761	842
July	22	32	1	200	50	21	262	283
Aug.	17	22	-	204	47	43	230	273
Sept.	31	142	8	149	72	14	357	371

(a) Includes Factories.

GOVERNMENT RAILWAYS.

Passengers carried in August, 1942 were 19.9m. compared with 18.3m. in the previous month and 17.6m. in August last year. In the eight months Jan. - Aug. passengers carried this year (149.5m.) were 11.65% above last year (133.9m.)

Tonnage of goods and livestock carried was much greater than last year though wool has not been transported to ports this season as quickly as usual.

In comparison with last year there was an increase in working expenses during July and August, 1942 but earnings were at a high level and the excess of revenue over expenses was 82.9 per cent greater.

N.S.W. GOVERNMENT RAILWAYS.

Year.	MONTH OF AUGUST.			TWO MONTHS ENDED 31ST. AUGUST.		
	Passenger Journeys.	Tonnage of Goods & Livestock.	Excess of Revenue over Working Expenses. ø	Passenger Journeys.	Tonnage of Goods & Livestock.	Excess of Revenue over Working Expenses. ø
	Million.	'000	£000	Million.	'000	£000
1939	14.3	1,517	502	29.5	2,903	872
1940	14.9	1,744	825	30.5	3,546	1,632
1941	17.6	1,312	656	34.3	2,772	1,279
1942	19.9	1,701 *	1,221	38.2	3,360 *	2,329

ø Excl. interest, sinking fund and exchange which for the year amounted to £6.55m. in 1939/40, £6.62m. in 1940/41 and £6.57m. in 1941/42.

* Partly estimated.

GOVT. TRAMS & OMNIBUSES.

Earnings of Government trams, and omnibuses in the two months July - Aug. 1942 were 30% higher than in the same period of 1939. Working expenses were 32% higher and passenger journeys were 33% greater.

N.S.W. GOVERNMENT TRAMS & OMNIBUSES.

Year.	MONTH OF AUGUST.				TWO MONTHS ENDED 31ST AUGUST.			
	Earnings.	Working Expenses. ★	Excess of Earnings over Working Expenses. ★	Passenger Journeys. Ø	Earnings.	Working Expenses. ★	Excess of Earnings over Working Expenses. ★	Passenger Journeys. Ø
	£000	£000	£000	Million.	£000	£000	£000	Million.
1939	354	314	40	30	705	622	83	60
1940	368	299	69	32	739	613	126	64
1941	424	354	70	38	852	715	137	76
1942	464	417	47	41	918	821	97	80

★ Exclusive of interest, sinking fund, exchange and current depreciation - £0.67m. in 1939-40, £0.66m. in 1940/41 and £0.61m. in 1941/42.

Ø Excluding Harbour Bridge Section Tickets.

MOTOR VEHICLES.

There has not been any significant change in motor vehicle registrations in recent months.

N.S.W.

MOTOR VEHICLES REGISTERED AND NEW REGISTRATIONS.

Number Registered	Aug. 1939.	Nov. 1941.	Mar. 1942.	July 1942.	Aug. 1942.	Sept. 1942.
Cars ('000)	217	191	173	170	170	170
Lorries & Vans ('000)	78	75	73	71	71	71
Total ('000)	329	298	274	267	267	267
New Registrations - Av.						
No. per week -	322	39	13	13	17	12
Cars & Cabs. No.	146	50	19	8	4	2
Lorries & Vans No.						

